

THE PHILANTHROPY BRIDGE FOUNDATION

Concepts, Ideas and Projects

“Why do people become philanthropists? There are many reasons for it. Just listen to your heart”

- History of Trust in Mistrustful Times (2007)

Background & PBF Philosophy

The Philanthropy Bridge Foundation (PBF) was conceived from almost twenty years of Olga Alexeeva's knowledge and experiences from working at the Charities Aid Foundation, first in Russia, and later worldwide. It was to be 'a project of creativity', she once said, where processes were to follow ideas, and not the other way around. In order to succeed, PBF was to be driven by the passion of the team, of our partners, as well as of the philanthropists and charities whom we endeavoured to support. PBF's ultimate aims – as the name suggests – were to bridge the interests and challenges, and to build much needed trust between the donors and the beneficiaries within developing and emerging market countries around the world. As economic globalisation intensifies and as wealth continues to grow in the East and the South, so do the disparities between the rich and the poor, and thus the traditional reliance on Western funding. What Olga and PBF hoped to achieve was a shift in this paradigm, whereby conditions of the poor were ameliorated by the funds of the rich in their own countries, so that social development would eventually become more sustainable and trust between local donors and CSOs would be forged.

Olga's approach was to start ambitious, and then reduce any activities if necessary. We would seldom turn down a meeting or proposal to collaborate with other parties, unless it was truly unwise. PBF's philosophy was – quite simply but successfully – to talk to everyone and try to do as much as possible that was relevant to our work. The sharing of ideas and contacts with others was also never limited, as Olga did not believe that anything useful should be kept from others since we all ultimately had the same visions and goals.

Within the year or so that PBF was established, we had built up a distinguished network of committed consultants from across the globe, who would be willing to work on our projects with us or on our behalf. We had established new partnerships and were embarking on projects with organisations from China, Vietnam, Hong Kong, Indonesia, the US and the UK – as well as with our existing colleagues from Russia, Brazil, South Africa, India, the Middle East and elsewhere. We had planned and co-hosted a number of events and meetings in various countries with good feedback, and had set up our website and branding. Mistakes were made as we were trying to find our footing, but Olga and PBF had come a long way, and we hope that this work will now continue through others.

This paper will summarise PBF's activities and approaches, some of which had started to be implemented, and some which were still being dreamt up and formulised.

The PBF Structure

Olga was determined that PBF's work would not be hampered by bureaucracy or internal politics. Therefore, the overriding vision was that the core PBF team would never exceed five people, no matter how much work there was to be done (by the time Olga passed, there were three). Olga and the team would then build up a network of PBF 'experts' or 'consultants' from countries that we wanted to work in, which would gradually expand as our workload increased. Our aim was for the network to meet on a regular basis to discuss the projects and events that PBF planned to launch, so that we could receive constructive feedback or suggestions on how to make them better or more culturally relevant before we began. The experts could then support or coordinate the project as they wished.

PBF also had a distinguished board of trustees and had started to build up an advisory board – all of whom were long-time friends and colleagues of Olga's.

PBF Projects & Activities

i. Donor Education in Emerging Markets

“A businessman may simply think one day about his life and what will be left after he is gone: five dozen expensive shirts, a luxury villa, his company – or a project that could change the country where he made his money, so that in 100 years he appears in history books as Rockefeller appears today – he created the first system of accessible medical care in America, or Tretiakov – he created the first accessible public museum in Russia ... Charity is a direct personal influence on history”

- History of Trust in Mistrustful Times (2007)

One of the main drivers of PBF was providing donor education in emerging market countries. It was a project that was carried over from Olga's work at CAF and re-adapted for PBF. The overall objective was to change the values system of the wealthy in countries that traditionally relied on funding from the West. It was hoped that the wealthy – whether from 'old' or 'new' money – would eventually reconsider their social responsibilities towards their own people, as well as reevaluate the ways in which they endeavour to be socially responsible. Before PBF was even established, we could already witness the impact of Olga's conviction in this project – particularly in her native Russia. Her passion and fearlessness, combined with her philosophy that 'every crook can change', made her a stimulating speaker who was impossible to ignore, even for some of the world's most wealthy and powerful people.

PBF's donor education was implemented by various means: through small informal meetings of peers, seminars with big-name philanthropists, study visits to Europe or the US, or individual consultations – whichever best suited the aspiring donor and captured their interest. Depending on the level and experience of their giving, we would tailor the programme to meet the donor's needs – i.e. if the individual was very new to giving, PBF would first recommend a consultation and a study visit in order to determine where his/her passions lay, and to provide him/her with a comprehensive 'giving gallery' of options before deciding what the final vision and strategy would be. If the individual was more advanced in their giving or had already established their own foundation, however, we would invite them to share their ideas and experiences with their peers through informal meetings and programmes, such as the CAF Foundation School (see below), so that new ideas could be formed, solutions to problems and challenges discussed and found, and an effective, progressive community of practice built.

Donor education projects were either carried out by the PBF team itself or through our partners and experts, depending on the situation. The key to their success was always to leave participants with more questions than answers, so that their giving visions and strategies did not stop evolving.

ii. CAF Foundation School

“True philanthropy is creative; it is about finding a solution to an insurmountable problem, charting a course for people lost in a darkened maze. There is no need to sacrifice your daily life; making a difference can be as straightforward as weaving one strand of tapestry, with others helping to complete the picture”

- History of Trust in Mistrustful Times (2007)

Falling under PBF’s donor education umbrella, the CAF Foundation School was an initiative that was launched collaboratively in 2008 by CAF Russia, IDIS in Brazil and CAF Global Trustees in the UK – headed up by Olga. After leaving CAF in 2010, Olga and PBF would continue to be a part of the Foundation School and become an additional institutional partner, with CAF Russia taking the helm of the project.

The Foundation School was first launched simultaneously in Moscow and São Paulo, targeting high net worth individuals (HNWIs) who practised or were interested in philanthropy, as well as senior executives of established philanthropic foundations. The second and third Foundation Schools, held in Germany and Italy respectively, brought together HNWIs from both Russia and Brazil, alongside their European counterparts, philanthropy experts, and sponsoring institutions such as private banks – all of whom put aside their positions and worked together as individuals to find new and improved strategies for philanthropy and social development.

Each week-long School programme was designed to be intensive. The aim was to cultivate a cooperative environment and a sustainable network between all those involved, including staff, speakers and sponsors, as well as the participants themselves. Depending on who would likely attend, the programme would be tailored to accommodate participants’ needs as much as possible. Session topics would, for example, range from building and defining a social vision to evaluating and monitoring impact, or overcoming legal and political constraints. Sessions were led by global leaders and experts in the philanthropy and social development fields.

iii. Charities ‘Translation’ Workshops

“The concept of philanthropy in emerging markets is blighted by misunderstanding. People mistrust organised charities and lack confidence in their true motivation and professionalism. For those who believe that charity begins at home, it can be difficult to accept that strangers may also care. For philanthropy to take proper root, these attitudes need to change. As long as charity is confined to a few enlightened oligarchs and a hundred passionate charity leaders, it will not develop beyond the inner circle”

- History of Trust in Mistrustful Times (2007)

Another major strand of PBF’s objectives was to build capacity for charities, both small and large, within emerging markets. The ‘Translation’ workshops were conceived as the other side of the ‘bridge’ between donors and beneficiaries.

Besides countless legal and political challenges, many charities in emerging and developing countries also face the difficult hurdle of fundraising from their own people. Many rely solely on

Western grants, which can often be unsustainable and leave smaller charities re-adapting their priorities to the grantmakers' objectives. Yet, this applies only to charities who can obtain grants in the first place. For charities with minimal human resources and very little experience in writing grant proposals, there is also very little chance of them passing the screening processes of large grantmaking foundations – no matter how valuable or worthwhile their work may be. Thus, many become disillusioned and helpless, causing them to close down and cease providing much-needed support for the people they aimed to help. This is not the fault of grantmaking foundations, since there needs to be an established process. We, instead, need to look at how fundraising can become more relatable, accessible and sustainable for charities in countries where the giving culture may not be so advanced. This is what PBF had already begun to do in Russia, Brazil, Indonesia and Vietnam.

The workshop programmes focused on understanding donors from emerging and developing markets, rather than on the problems that the charities had themselves. This approach ensured that the workshop did not turn into a talk shop, whereby different problems were merely discussed and compared. Because many such charities were already disenchanted by fundraising, there was very little point in trying to discuss the problems which they were all already too familiar with. Instead, each programme was designed for participants to think 'outside the box' within the context that they worked in. Why did they only look to Western aid to sustain them? Is it really better/easier? If one was wealthy and made money in X country through X means, what would inspire one to give? The workshop would not only make participants re-evaluate the possibility of local fundraising, but it would also help them to wear the shoes of a donor and question their marketing strategies and the language they use. This was where the name 'Translation' workshop derived from: we tried to help charities metaphorically 'translate' the mentalities and attitudes of donors so that their fundraising efforts could become more effective. Adopting the marketing methods and language used by Save the Children for a UK-centric campaign might not be the best idea for a grassroots tribal rights charity in Bali, for example. Each charity needs to find their own fundraising model that is relevant to the people of the country they are in. If one grew up in a poor family and only made money as an adult, seeing a poster campaign of a poor child (or 'shock therapy', as we call it) is unlikely to cause much impact. But what would? As Olga would say, 'market your charity in a way that your own grandmother would understand'.

Workshops would mainly involve participatory sessions that we tried to make fun, informative and memorable. Besides the PBF team speaking and facilitating (Olga and Oranutt), we would also invite local experts and charity representatives to contribute their thoughts and suggestions. Sessions could take shape as a panel discussion, an open floor debate, or an array of games – whatever would work and be most effective in the given environment. This was when we would seek the counsel of our local partner, who would fully contribute to the workshop design.

In London in early 2011, PBF also collaborated with EAPG (European Association for Philanthropy and Giving) to conduct a Translation workshop for large UK charities which had offices in emerging markets, or considered expanding their activities there. Here, the workshop concentrated on understanding the emerging market donor and the cultural/political/legal environment he/she was in, as well as understanding the needs of local charities and the importance of enlisting them as valued partners.

iv. Grantmaking Foundation Seminars

“You may decide that your main clients are those who receive funding. You are a friend of your grantees, you know them intimately, you can read between the lines and look behind the screens.

And then you become involved in their activities ... As a result, you face conflicts of interest. Fairness and equality in grant competitions are gone; your employees develop a circle of their favourite clients and start lobbying on their behalf. Instead of providing formal training in sustainability, your trainers write proposals for potential grantees at weekends. Technical assistance may become highly effective, grantmaking is not”

- ‘Funder or Friend – the dilemma for local intermediary grantmakers’
Alliance Magazine (March 2001)

At the time of PBF’s closing, we were in the process of organising a seminar in San Francisco for, and in collaboration with, large grantmaking foundations, which we hoped to continue as a series. The seminar was to address the issue of sustainable grantmaking within emerging and developing countries (to coincide with issues raised in the Translation workshops above).

The agenda would look at old and new challenges of the grantees, as well as old, new and ‘unpopular’ causes in different countries arising from urbanisation, modernisation and globalisation. There would also be a discussion on current grantmaking policies and how they could be enhanced to give more opportunities to smaller charities that were less experienced in writing proposals. Finally, the seminar would encourage grantmaking foundations to continue investing in donor education as a long-term and sustainable means to civil society growth and advancement.

PBF would then act as consultant to any foundations who were interested to pursue any of the issues addressed, as well as work with them to continue hosting the seminar series for other Western and Northern grantmaking foundations.

v. Seminars on ‘Unpopular’ Causes

“The Civic Forum could have become a ‘civic chorus’ of support for the President, but it didn’t. It could have focused on safe issues of social protection and ignored human rights, Chechnya and army reform, but it didn’t. The ball is now in our court...partnership will equal loyalty if NGOs do not continue to remind the state that partners in social reform are not lovers and cooperation does not mean a ban on criticism”

- ‘Civic Forum or Civic Chorus? Russian NGOs must decide’
Alliance Magazine (March 2002)

One of PBF’s most important objectives was to promote causes which were often overlooked or which carried a cultural stigma within emerging market countries, such as women and child trafficking, HIV/AIDS, forced prostitution, homosexuality, human rights, tribal land rights and environmental sustainability. We called these ‘unpopular causes’ as many people were afraid to support them for a variety of reasons, or simply did not know enough about them. Rather, most people preferred to support easier, or more ‘popular’ causes, such as the building of schools, churches, orphanages, hospitals and museums, or cultural and identity preservation (which sometimes acted as a double benefit in boosting one’s reputation). We did not say that popular causes should cease to be supported, but that the ‘giving gallery’ of wealthy donors should at least be broadened in order to maximise social impact and philanthropic potential.

After hearing about the difficulties that indigenous charities in Bali faced in promoting their cause, PBF decided to begin a series of seminars for potential donors focused specifically on

unpopular causes – starting with indigenous issues in Brazil and wider South America. Unfortunately we never got around to holding the seminar, which was scheduled to take place in September 2011. The agenda would have questioned the prejudices attached to indigenous issues, and highlighted the many important aspects of their cause, including environmental protection. It was envisaged that the seminar would be replicated in other countries for different causes, and that networks of charities working on similar issues would be organically formed as a result, so that they could share ideas about new ways of making ‘unpopular’ facets of society become more popular.

vi. Global Donor Education Project

“New philanthropy in Russia and China is philanthropy that is new-born. Like a new-born child it is disoriented, its movements are uncoordinated, it is easily frightened and gets distrustful after even the slightest negative experience”

- ‘New Philanthropy: a micro-world of busy youngsters’
Alliance Magazine (March 2007)

The Global Donor Education project was to be a joint venture between PBF, Active Philanthropy in Germany and Bolder Giving in the US. It had just reached conceptualisation stage, where we planned to engage and raise funds from a major grantmaking foundation and begin the project by producing a ‘global’ philanthropy toolkit.

The toolkit would include mainstream philanthropic approaches and best practices throughout the ‘giving journey’ (i.e. from establishing a vision and mission to needs assessment, grantmaking and impact evaluation), as well as incorporate ideas, challenges and experiences of various cultural scenarios from around the world. It would then be launched and published in multiple languages, both in hard copy and online.

We envisaged that the toolkit would be used both to standardise and to further pioneer philanthropic best practice around the world by those working in the field. PBF and its partners would also use the toolkit in joint events which ensued.

vii. China in Africa Conference: Building a Roadmap for CSR

“For many companies, charity is a business logic. A brand’s reputation is important for a successful business. I encourage this logic as it brings profit not only for the business, but for all of us as well”

- History of Trust in Mistrustful Times (2007)

The China in Africa project aimed to take shape as an ambitious multi-stakeholder conference addressing China’s CSR and community engagement policies in Africa, scheduled to be held in Johannesburg in the spring of 2012. The proposal for the conference had been finalised, and discussions with partners were under way – with Barry Smith and Zoltan Valcsicsak, two of PBF’s experts/consultants, taking the lead. We hope that this project will still go ahead (funding permitting), in collaboration with Trust Africa and an additional partner from China.

Unlike some other China-Africa conferences, this one would be civil society-led and focused, and politically unbiased, taking into account the benefits as well as the shortcomings of the activities of Chinese corporations in African countries. Solutions and ways forward for better and more sustainable collaboration would dominate the agenda, which would include discussions such as:

- Community development programmes in Africa – lessons to be learned from existing CSR practices and civil society activities
- Dialogue with local representatives on the use of community-owned resources – the current situation and best practices
- Local employment and training – the opportunities and challenges
- Employee engagement in local community support
- Funding local needs – what a company could and should prioritise
- Local governments versus community leaders/local NGOs – how best to balance interests
- How to address HIV-related issues that impact businesses
- Effective stakeholder engagement in business decision-making and problem-solving
- Considering community-based solutions to address environmental issues

The conference would have 100-150 attendees (including speakers), made up of corporate, civil society and relevant government agency representatives from both China and African countries.

The Chinese government has recently initiated a variety of aid and technical assistance programmes in those African countries where China is most active. Corporations have also made efforts to reach out to local communities and address their needs, but all too often they lack a clear roadmap of how best to engage and move forward. In addition to this, Chinese companies have not fully realised the powerful role that strategically implemented CSR programmes could potentially play in gaining licence to operate in Africa, developing competitive advantage, enhancing corporate reputation and, in certain cases, increasing productivity and business efficiency. The project would provide a unique platform, free from any political finger-pointing, to discuss the role of China's economic investment in Africa's social development, as well as to strategize effective models for community engagement programmes.

viii. Supply Chain Community Engagement Programme

“In reality, proper philanthropy is a constant challenge – tougher than any business”

- History of Trust in Mistrustful Times (2007)

The Supply Chain Community Engagement Programme originally stemmed from an idea of Zoltan Valcsicsak – former head of CSR for Levi's in China – who approached Olga and PBF about the possibility of collaborating to devise a project to address the problem of multinational CSR policies. Once drawn up, the aim of the programme was to engage owners and senior executives of multinational corporations that operate within emerging market countries (particularly China) in dialogue on philanthropy and corporate social responsibility, specifically by addressing their supply chain. Through tailored community engagement training of supply chain companies, the initiative would in turn improve the sustainability of local NGOs in such countries.

Major multinational corporations, especially those that work in retail, retain very large and constantly shifting supply chains within emerging market countries, crucially in China and wider South East Asia. Consequently, such multinationals – many of which are headquartered in the US or Europe – are faced with many challenges: (1) Supply chain companies generally do not share the values of their multinational partners, and while their branding aligns, the values advocated by the brand often do not; (2) Work practices of supply chain companies, and their relationships with employees, the authorities and local communities, are often perceived to be of an unacceptably low standard, and also sometimes violating international laws and treaties; (3) The mismatched work practices between multinationals and their supply chain companies result in decreased international consumer confidence, bad public relations and media exposure, and

an overall decline in brand value; (4) Today, the necessity to uphold certain CSR standards means that many multinationals are forced to frequently change their suppliers, which in turn impacts on the quality of their products, the cost of production, and the efficiency of their production processes. While in the short term, multinationals save on cheaper labour and CSR programme expenditure, they lose in the long term through costs associated with sourcing new suppliers, declining consumer confidence and brand value, and stunted business efficiency.

From the standpoint of philanthropy and NGO sustainability, owners of supply chain companies (which are predominantly privately owned) represent untapped and effective potential for support. Such companies are often the largest employers within a particular community, and thus have the potential to play a life-changing role in the communities where they operate without having to invest much more financially.

PBF and its partner (not yet recruited) planned to launch this programme first in China and Vietnam, by first engaging CSR directors of multinational corporations in dialogue about their supply chain training and gaining access to their local supply chain companies. We would then approach the owners of supply chain companies to engage them in dialogue about philanthropy and corporate social responsibility, and the implementation of community sustainability projects. In parallel, to make the programme integrated, we would also reach out to local NGOs through workshops focused on resource mobilisation and building relationships with local donors, including those participating in the Supply Chain Community Engagement Programme.

The project in its entirety was envisaged to be long-term, with the first phase of conducting research and recruiting participating corporations and supply chain companies expected to last one year.

ix. School Philanthropy Programme in China

“In order to make a significant change, you don’t need to become a president, a politician or a minister. You can simply do something that no-one really thought about. You can try to find the reason behind the problem and invest in its termination. And then, like a candle lit inside a snowball, the problem will melt from the inside”

- History of Trust in Mistrustful Times (2007)

Building on the recent rapid growth of philanthropic foundations in China, and following from discussions with our Chinese colleagues about family philanthropy, PBF had begun to put into place the first of our school philanthropy programmes in China. Partnering with the Western Academy of Beijing (WAB), PBF was to be the main guest at the school’s annual Global Issues Day, where approximately 1,000 students and their parents from 11 other high-end international schools around Beijing would be in attendance. As this event was scheduled for November 2011, it sadly did not take place.

PBF decided to partner with an international school in the first phase of our project due to the strict constraints and curricula that Chinese schools have to adhere to. At the WAB, PBF would introduce a new philanthropy element to the day, in order both to promote a culture of charitable giving among wealthy families and future business leaders and to encourage a next generation of socially-conscious individuals from the Asian emerging and developing economies. This would have been PBF’s first stage of collaboration with schools in the Asia region, which would be followed by longer and more in-depth programmes once significant interest had been gained. The original plan was to invite a famous Chinese philanthropist such as Jet Li to be the keynote speaker, with PBF as the facilitator of ensuing questions and discussions, and as the host of a separate meeting with the students’ parents about philanthropic giving.

Representatives from the Narada Foundation, the Vantone Foundation and the China Foundation Centre expressed a keen interest in sending their children to the event, as well as in attending themselves.

x. Travelling Seminars in India

“While corporate charity is often part of business (and there is nothing wrong with that), private charity is much more focused on the satisfaction of the altruism of human beings, which is inherited genetically”

- Dmitry Zimin, Founder of the Dynastia Foundation, Russia
In History of Trust in Mistrustful Times (2007)

Together with iPartner India, headed up by Bina Rani, PBF had planned to fundraise for a series of ‘travelling seminars’ for philanthropists and potential donors across India. Since Bina had a wealth of knowledge and contacts in the country, and since India was not an area where PBF had expertise, we would have taken a back seat in the project, offering support and different perspectives.

The travelling seminars would consist of small, exclusive meetings for wealthy donors focused on various social issues and aspects of both corporate and private philanthropy, to be held in various major cities across the country. Depending on how successful the meetings were, we hoped that the project would run annually, supporting and feeding into the larger and newly established Indian Philanthropy Forum, hosted by our colleagues at Dasra.

xi. Celebrity Giving

“There is no doubt that philanthropy needs publicity. As we have discovered, tax relief, public recognition or personal satisfaction are not the main reasons why people give to charity. At its core, philanthropy is underpinned by humanity’s inability to be indifferent to other people’s suffering. Acknowledging and promoting these elements of human nature in all of us will produce the best possible publicity for philanthropy”

- History of Trust in Mistrustful Times (2007)

This was a highly ambitious project that many of our peers were wary of due to reputational implications, but which the PBF team decided was worth giving a go. The vision was to create regional networks of celebrities with a philanthropic purpose – starting with Russia/CEE and Asia. The objectives were: (1) to encourage celebrities to not only engage in ad hoc charity work but to commit to long-term philanthropy; (2) to build a coalition with non-political power and influence to help shape public attitudes towards giving and social issues; (3) to promote a reassessment of the celebrity’s role within society.

As many celebrities in the West have already established their own philanthropic foundations in support of various causes, this would incentivise celebrities in other parts of the world to do the same. However, taking into account that the context of ‘celebrity’ carries different meanings in the complex political and social environments of emerging markets, we thought that building a network coalition whereby celebrities could work as one, as well as individually, would create the most impact. The idea was to develop a ‘discourse hegemony’ of social needs, by those who the wider public would listen to, no matter their gender, race, class, or political inclination. The celebrity coalition could (as impartially as possible) bring everyone together to focus on specific issues. Our challenge, then, would have been to make sure that the limelight shone on

the issue, and not just the celebrity. In highly celebrity-centric cultures like Asia, this endeavour might have worked.

The project was only in its infancy stage when Olga passed away, although PBF had already started to work with CAF Russia to organise our first celebrity philanthropy event, which was to have been held in Moscow in September 2011.

For further details of PBF's projects, proposals, events and partners, please contact Oranutt Narapruet: oranutt.narapruet@gmail.com.

“My most memorable encounter with a donor client happened around ten years ago, in my native town of Krasnodar in the south of Russia ... The potential client, a heavily built, grim-looking man, was a wealthy agricultural ‘oligarch’, a local entrepreneur.

I started talking about CAF Russia and how we could help him and his company to set up his giving. He listened for about a minute and then said: ‘Shorter!’ Slightly taken aback, I nevertheless went directly into my proposal. ‘Shorter!’ he repeated. Somewhat confused, I cut even further: ‘Shorter!’ I took a deep breath and went for it: ‘Ten thousand dollars a year for your local schools.’ He looked at me again and then nodded approvingly: ‘Agreed.’”

- ‘Catching the “up” moment on the roller coaster ride’
Alliance Magazine (September 2010)